

## CASUALTY ASSISTANCE CHECKLIST

*(to be completed by retirees and spouses and kept in your files for your survivors to use)*

Name:

Social Security Number:

Date of Birth:

Place of Birth:

Date of Retirement:

Retired grade/rank:

Enrolled in RSFPP, SBP, SSBP (circle all that apply) Did you disenroll from this plan? YES NO (circle one)

VA Claim #:

Eligible to draw VA disability compensation (even if not currently in receipt): YES NO

Receiving Social Security: YES NO If yes, age at which first received:

Organ donor: YES NO

Is there a living will? YES NO

### SPOUSE INFORMATION

Name:

Date of birth:

SSN:

### MARRIAGE INFORMATION

Date of Marriage:

Place of Marriage (City, State, Country):

### CHILDREN INFORMATION

Name Birthdate Address

Incapable of self-support?

### INSURANCE POLICIES

Policy # Company Amount (include "as of" date) Beneficiary

Agent phone #

### INVESTMENTS

Type (IRA, CD, Mutual Fund) Company Amount (include "as of" date)

Agent phone #

### BANK ACCOUNTS

Bank Name Phone # Type of Acct Amount (include "as of" date) Account #

### CREDITORS

Name & Address Phone # Account # Balance Due (include "as of" date) Life insurance?

## BURIAL INFORMATION

Who should be notified of your death:

Name	Relationship	Address	Phone #

Do you want to be (circle one): Buried    Cremated?

Name of cemetery where you want to be buried:

Do you want to be buried in your uniform? YES NO

Do you want a memorial service? YES NO    If yes, where?

Have you purchased a burial plot? YES NO    If yes, where?

Do you have a preference of funeral home? YES NO    If yes, which one?

Do you want a military honor guard? YES NO

## LOCATION OF DOCUMENTS

### DOCUMENT

### WHERE LOCATED

Living Will	
Current Retired Pay Statement	
Marriage Certificate(s)	
Divorce Decree(s)/property settlement(s) (from previous marriages of retiree or spouse)	
Death certificate(s) (from previous marriages of retiree or spouse)	
Birth certificates/adoption papers (retiree, spouse, children)	
DD Form(s) 214 (Active Duty Discharge Record ) (for all periods)	
Retirement Orders	
Safe-Deposit Box List Contents:	
Will	
Vehicle Registration & Title	
Insurance policies	
Investment papers	
Burial plot information	
Uniform for burial	
Medical and dental records	
Real Estate deeds	
Tax returns	

## PHONE NUMBERS

Casualty Assistance Office (immediate assistance upon retiree's death) call 1-800-626-3317 or, from overseas, call collect (703) 325-7990

Retirement Services Office (follow-up assistance) numbers are listed on pages 9 and 10 of *Echoes*  
VA 1-800-827-1000    VA Insurance 1-800-669-8477    Social Security 1-800-772-1213

Retired Pay 1-800-321-1080    Annuitant Pay (for RSFPP and SBP info) 1-800-435-3396

ID Card office    Lawyer